Automotive Lighting Market Analysis By Technology (Halogen, Xenon, LED), By Application (Front/Headlamps, Rear, Side, Interior) And Segment - Forecasts To 2022

Description: The automotive lighting market is anticipated to reach USD 34.65 billion by 2022. Strict government policies and rising safety concerns are likely to propel growth over the forecast period. In addition, growing consumer awareness concerning the significance of adaptive lighting including dynamic bend light and a glare-free high beam is also expected to have a positive impact on the exterior lighting market.

Increasing apprehensions about using energy efficient methods coupled with rising consumer disposable income are expected to drive the industry. In addition, growing demand for vehicles and technological advancements in the automotive industry are expected to propel utilization. Attractive growth opportunities for new entrants are expected in the industry owing to the growing number of total vehicles purchased y-o-y across BRIC nations. However, there is a need for legislative authorities to collaborate with light sourcing technology suppliers to develop flexible design techniques.

Automotive LED market is estimated to demonstrate considerable growth at a CAGR of over 12.0% from 2015 to 2022. Halogen lights contributed to over 66.0% of overall industry revenue in 2014, followed by LED and xenon. It has gained prominence on account of easy availability, low purchasing costs, and low replacement costs. However, rising fuel prices are expected to pose a threat to the industry.

The increase in demand for eco-friendly LED technologies on account of high efficiency, reduced CO2 levels, and high power, is expected to propel growth. Companies have been trying to develop eco-friendly LED to promote product differentiation and strengthen their global foothold. LEDs are used in daytime running lights (DRL), parking light, brake lights and turning lights. LEDs are preferred over xenon and halogen lights owing to optimum light bearing capacities and improved design which lead to increased shelf life.

The adaptive headlight is an active safety feature that is intended to enhance the drivers' visibility in poorly illuminated areas. It encompasses functionalities including automatic rotation which can sync with sensors and adjust brightness and intensity of light. Front lighting segment constituted for over 70.0% of the total revenue in 2014 owing to the availability of advanced features including automatic rotation which can sync with automatic brightness modules and sensor response. Extreme climatic conditions in Europe and North America is expected to trigger demand for fog lights over the forecast period.

Automotive lighting industry in Asia Pacific is estimated to grow at a CAGR of over 8.0% and acquire a market share of about 45.0% over the forecast period. The continuous expansion of suppliers coupled with a vast production base is expected to position this region as the market leader. Countries including India, Japan, and China account for the major production base for vehicles globally, thus offering extensive growth opportunities.

Key companies including Hella KGaA Hueck & Co., Koito Manufacturing Co., Magneti Marelli S.p.A and Valeo. Vendors usually employ the strategy of new product development and mergers & acquisitions to enter new markets. The introduction of low-cost LEDs and energy-efficient alternatives is foreseen as a cost-effective strategy for the industry.

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